



**China Solid Waste Disposal Industry
Report, 2013**

Apr. 2014

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

China solid waste disposal industry was chiefly featured by the followings between 2012 and 2013.

Firstly, disposal scale continued growing: in 2012, the amount of household garbage clear-up in urban regions of China rose by 4.15% year-on-year to 170 million tons; the volume of harmless garbage disposal grew by 10.7% year-on-year to 145 million tons; in 2012, the industrial solid waste output in China increased by 1.94% year-on-year to 3.29 billion tons.

Secondly, Incineration disposal occupied a growing proportion in the structure of household waste disposal in urban regions of China, with the proportion up from 5.55% in 2004 to 24.74% in 2012. As of late 2012, China had 138 garbage incineration plants in urban regions, a year-on-year rise of 29 ones over 2011, with the disposal capacity jumping by 30.32% year-on-year to 123,000 tons/day, and the amount of disposal soaring by 37.89% year-on-year to 35.84 million tons.

Thirdly, leading industrial players strove to expand solid waste disposal business thanks to the industrial boom.

Major Operating Indicators of Household Garbage

Disposal in Urban Regions of China, 2012

Operating Indicators	Figure	YoY Change
Amount of Household Garbage Clear-Up (mln tons)	170.8	4.15%
Harmless Treatment Facilities of Household Garbage (Unit)	701	3.55%
Harmless Treatment Capacity of Household Garbage (kt/day)	446.3	9.08%
Amount of Wastes Through Harmless Disposal (mln tons)	144.9	10.70%
Of which:		
Landfill (%)	72.55%	down 4.33 percentage points
Incineration (%)	24.74%	up 4.88 percentage points
Composting & Others (%)	2.71%	down 0.55 percentage point
Harmless Treatment of Household Garbage (%)	84.8%	up 5.1 percentage points

Source: NBS; ResearchInChina

Sound Environmental Resources Co., Ltd. is the leader in domestic solid waste disposal field, with businesses covering the whole range of the solid waste disposal industry chain. With engineering contracting as its major business pattern, the company's revenue from solid waste disposal engineering business hit RMB727 million in H1 2013, up 15.91% year-on-year, or accounting for 70.22% of its total revenue. In Feb. 2014, it announced five outbound investment projects: Biqing Bio-Technology (Bijie) involving in kitchen waste disposal, Hubei Sound Environmental Protection involving in recycling project development, Weixian County Sound Environmental Protection involving in incineration field, Hunan Sound Sludge Treatment referring to sludge project and Changyi Zhimei Environmental Sanitation relating to sanitation project development field.

In Jan. 2014, Shanghai Chengtou Holding Co., Ltd will make a buy-back of 40% stake of Shanghai Environment Group as a move to consolidate its comprehensive strength in solid waste disposal business. Since 2012, the solid waste disposal business of the company has sustained rapid development; in 2013H1, the company's revenue of the business increased by 18.54% year-on-year to RMB246 million.

In Dec. 2013, Grandblue Environment Co., Ltd was set to take over 100% stake of C & G (China) as a move to realize its disposal capacity approaching 15,000 tons. The acquisition, moreover, will make the company get rid of regional limitation, stretching its business from Nanhai of Guangdong Province towards all across China. In H1 2013, the revenue of the company from solid waste disposal business went up by 22.28% year-on-year to RMB138 million, with the proportion up from 4.38% in 2007 to 31.09%.

The report highlights the followings:

1. status quo of household garbage disposal industry in urban regions of China, including analysis on the overall generation and disposal amount, three major disposal technologies, regional distribution, market competition pattern;
2. status quo of industrial solid waste disposal industry in China, including analysis on the generation amount and three major disposal technologies;
3. analysis on China solid waste disposal equipment industry, including overall output and regional distribution;
4. 14 key solid waste disposal enterprises in China, including operation, solid waste disposal business, and major investment projects, development strategies.

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